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ABSTRACT

This document is part of a five-module training package to help employment and training service providers comply with the Workforce Investment Act (WIA) of 1998 and develop a one-stop training and employment services system. It contains the participant workbook, trainer manual, and activity worksheets for a module on collecting and using customer feedback. The training manual presents a detailed lesson plan that includes step-by-step instructions for using the following tools and techniques to deliver the module: presenting overhead slides, having participants complete exercises; writing information on flip charts; using small group discussions; and using full group discussion. The workbook activities and worksheets are designed to help participants understand why customer feedback should be the foundation for designing a responsive service system and to teach participants to collect and analyze customer feedback. Participants are presented with a four-phase customer feedback collection consisting of the following actions: (1) prepare to collect feedback by identifying services

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and/or products, customer values, customer requirements/attributes, and product features; (2) use qualitative and quantitative techniques to collect proactive and reactive feedback; (3) use qualitative and qualitative methods to analyze feedback; and (4) utilize customer feedback in policy and procedural decisions, to make individual daily improvements, and as part of a continuous improvement system. (MN)

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Partnering for Quality under the Workforce Investment Act: A Tool Kit for One-Stop System Building

Module 3: Collecting and Using Customer Feedback

Trainer Manual with Participant Workbook

Deborah Kogan, Vinz Koller, Richalene Kozumplik, and Mary Ann Lawrence

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SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:

A Tool Kit for One-Stop System Building

Trainer Manual

(with Participant Workbook)

July 1999

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Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 3

Collecting and Using Customer Feedback

Trainer Manual

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Module 3. Customer Feedback

Trainer Manual Guidelines

This manual provides a step-by-step approach to training on *Collecting and Using Customer Feedback*. This session is the third in a series of five training modules designed to help local workforce development agencies collaborate to improve customer services. The complete curriculum on *Partnering for Quality under WIA* includes:

- Module 1. Reviewing System-Building Progress and Developing a Blueprint for WIA Transition
- Module 2. Partnering and Organizational Change
- Module 3. Collecting and Using Customer Feedback
- Module 4. Designing a System for the Delivery of Integrated Services
- Module 5. Building a Process for Continuous Improvement

Each module has a series of companion products. In addition to this trainer manual, products developed for Module 3 on *Collecting and Using Customer Feedback* include overhead transparencies and a student workbook.

The best place to start with this guide is to read it through once. The guide is designed to be easy to understand. Following are points for reading and using the guide.

> Sentences typed in ***bold italics*** are intended to be said by the trainer to the group.
>
> - Sentences with a bullet in front of them are action items that the trainer needs to do.

Module 3. Customer Feedback

Icons on the left hand side of the guide provide a visual view of the type of activity that is taking place. The Icon Key is provided below.

- Use overhead slide.

- Have participants complete exercise.

- Write information on flip chart.

- Use small group work/discussion.

- Use full group discussion.

Module 3. Customer Feedback

- Write "Welcome" and your name and phone number on a flip chart at front of room prior to attendees arriving. Also include your e-mail address if you have one.

WELCOME! I'm glad you could be with us today.

- Introduce yourself and give a brief description of your background and qualifications to lead this training module.

- Put on title overhead for Module 3.

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Partnering to Improve Customer Services:
A Tool Kit for Workforce Investment Partners

Module 3
COLLECTING AND USING CUSTOMER FEEDBACK

This session will cover the material in your Participant Workbook under Module 3. Collecting and Using Customer Feedback.

- Put on Overhead 3-2.

Customer/Provider Activity

Purpose

- To learn the importance of using customer feedback to develop a product.

3-2

The purpose of the beginning activity is to learn the importance of using customer feedback to develop a product..

- Put on Overhead 3.3.

- Display one bullet point at a time.

Customer/Provider Activity

Instructions:

- Find a partner--Designate one person as "A" and one person as "B." "A" s play the role of the customer; "B"s play the role of the provider.
- The trainer will hand out picture to "A"s.
- "A"s will review a picture and develop a one-word description of what they want "B"s to draw for them.
- "B"s have 2 minutes to draw the picture based on the one-word description.

3-3

- Display the first point on the overhead, and say:

Find a partner. Decide which of you will be partner "A" and which of you will be partner "B."

- After you have given them time to do that, ask that the "A's" raise their hands. Then have the "B's" raise their hands so that you can determine that everyone has a role. If there is one person without a partner, have them join another group and designate 1 "A" and 2 "B's."

- Display the second point on the overhead, and say:

The "A's" will play the role of the customer and the "B's" will play the role of the provider.

- State that all of the "A's" (customers) need to come to the front to receive a picture. Distribute blank sheets of paper to the "B's" (providers). Once the customers have the picture, have them jointly —but without the "B's" hearing them—determine a one-word description for the picture. Once they have come to consensus on that one-word description, have them return to their seats while keeping the picture secret from the provider.

- Display the third point on the overhead, and say to the "B's" (providers):

The customers are going to ask you to draw a picture. The objective is to make a drawing that looks like the picture they are holding. However, they are only going to give you a one-word description of the picture. Do your best. The point of this exercise is not to see who is the best artist, but to get the best likeness (key features) of the picture that is held by the customer.

- Display the fourth point on the overhead. Tell the providers that they have two minutes to draw the picture. Set the timer for two minutes. Make sure no other communication happens between the "A's" and the "B's" while the "B's" are drawing.

- Put on Overhead 3.4.

- Display one bullet point at a time.

> Customer/Provider Activity
> **Instructions,** Continued
>
> - "A"s review drawing and determine if it meets their criteria.
> - "A"s provide additional verbal feedback to "B"s and use the next 2 minutes to help them to create the picture they require.
> - Debrief the process.
>
> 3-4

- Display the first point on the overhead and tell "A's" to review the picture drawn by the "B's." Have the "A's" determine if it is **exactly** the same as their secret picture.

- If not, display the second point on the overhead. Instruct the "A's" to provide feedback and all the necessary information to the "B's" to insure that the picture drawn by the "B's" is exactly like the secret picture. Set the timer for 2 minutes.

- Display the last point on the overhead and help the participants debrief the process.

- Facilitate group discussion on the activity they just completed.

- Put on Overhead 3-5.

Customer/Provider Activity

Review Questions

- "B"s - When you were unable to check with your customer, did you provide the product they were expecting?
- "B"s - How did you feel/what did you think without information from your customer? Was it hard or easy to know what to draw?
- "B"s - How did you feel/what did you think when you worked with your customer? What was easy? What was hard?
- "A"s - Did you get what you expected with the first picture?
- "A"s - What difference did you find when you were able to communicate with the provider as they were drawing the picture?
- As a customer (A), is your input important to get what you want and need? As a Provider (B), do you need the customer's input to know what the product should look like?

3-5

- Ask the questions on the overhead to the appropriate parties. Use the feedback from the "A's" and "B's" to determine how they felt doing the activity and what they learned.

Drawing pictures is not as complicated as developing a One-Stop center or system. The activity you have just completed makes it clear that in developing a One-Stop system it is even more important to have as much customer input as possible, so the "picture" comes out looking like what the customer has in his/her mind.

- Put on Overhead 3-6..

The Customer's Perspective

When one has no stake in the way things are, when one's needs or opinion are provided no forum, when one sees oneself as the object of unilateral actions, it takes no particular wisdom
to suggest that one would rather be elsewhere.

Seymour Sarason, 1990

3-6

- Read the quotation and discuss how this quotation relates to developing and managing a One-Stop center/system.

- Discuss how internal and external customers of the One-Stop need to provide input or they will not utilize the system.

- Put on Overhead 3.7.

Goals Clarification:
Develop a System Perspective

Get rid of:	Create:
"MY" Products	"OUR" Products
versus	
"YOUR" Products	

3-7

- Discuss how concentrating on customer requirements in developing the One-Stop will lead to products and services that lose the identity of each of the partner agencies and take on a new One-Stop identity.

- Discuss how to reduce agency "turfism" by concentrating on developing the products of the One-Stop to meet customer requirements.

- Introduce the learning objectives by saying:

In this session, we will review how to use customer feedback to create the best possible One-Stop for our customers.

Please introduce yourself and describe one thing that you would like to learn in this session.

- Record the responses on a flip chart and hang the completed pages around the room to return to throughout the session.

- Display Overheads 3-8, 3-9, and 3-10..

Learning Objectives

- Learn why customer feedback is a foundation for One-Stop services.
- Understand the process of customer feedback.
- Understand the 4 phases of customer feedback.
- Learn how to identify the product(s), customer(s), requirement(s), and standard(s) of the One-Stop system.

3-8

Learning Objectives, Continued

- Understand the two types of customer feedback and the methods to collect each type.
- Learn the methods to analyze customer feedback.
- Explore how customer requirements impact program design, customer flow, staffing patterns, office layout.

3-9

Learning Objectives, Continued

- Learn how to create a team action plan to begin designing/refining your One Stop's Customer Feedback Process.

3-10

- Review the learning objectives on the overheads one by one. Compare them to the stated requests of the participants.

- Put on Overhead 3-11.

Agenda

- Introductions/Welcome
- Why Use Customer Feedback to Design One-Stop Centers/Systems?
- The Cycle of Customer Feedback
- 4 Phases to the Customer Feedback Cycle
  - Prepare to Collect
  - Collect
  - Analyze
  - Utilize
- Setting Goals for Improving Customer Services

3-11

- Relate the agenda items to the stated requests of the participants and where we currently are on the agenda. Note that the next step on the agenda is the "cycle of customer feedback."

What do most organizations do when they are told that they must pay attention to "customer satisfaction?

- Once an attendee states "do a survey," put on Overhead 3-12 and ask the attendees to describe where on the listed items they find something that describes "do a survey."

The Customer Feedback Cycle

- ID Services/Products
- ID Customers of the Services/Products
- ID What Customer Values About Each Service/Product
- ID Customer Requirements (Attributes) for Each
- ID Product Features
- ID Customer Standards for the Requirements
- ID What to Measure
- ID What Data to Collect
  - Qualitative?
  - Quantitative?
- ID How to Measure - Which Statistical Process Control Tools
  - --To Collect
  - -- To Analyze
- Collect the Data
- Analyze the Data
  - -- Meet/exceed Customer Standard?
  - -- Not Meet Customer Standard?
- Make Improvements

3-12

- Once they say "collect the data," ask them to count how many steps preceded that step.

If an organization starts at "collect the data" they have missed 9 important steps.

- Review each of the steps one by one. Describe how each step is an important part of the cycle.

The steps in the customer feedback cycle can be divided into 4 Phases.

- Put on Overhead 3-13.

4 Phases to the Customer Feedback Cycle

- Prepare to Collect
- Collect
- Analyze
- Utilize

3-13

- Describe each phase.

Find a partner and discuss which of the steps on Overhead 3-12 relate to each of the phases on Overhead 3-13.

- Have one of the partner groups report out which steps go with which phase.

We will be reviewing each of the phases individually.

- Put on Overheads 3-14 and 3-15.

Customer Feedback
Phase 1: Prepare to Collect

FOCUSING THE PROCESS - ("THE MISSING PIECE")

- Identify services and/or products.
- Identify customers of each.
- Identify what customer values about each.
- Identify customer requirement(s)/attribute(s) for each.
- Identify product features.

3-14

Customer Feedback
Phase 1: Prepare to Collect
Continued

- Identify standards for each requirement.
- Identify what to measure - what do you want to know?
- Identify what data to collect.
  - -- Qualitative?
  - -- Quantitative?
- Identify how to measure - which statistical process control tools to use to collect.

3-15

This phase—"prepare to collect"—is the most forgotten and neglected phase. Many people tend to leave it out altogether. However, this phase is what ensures that the right data is collected in the proper manner.

- State that if this phase is neglected, organizations may not be able to analyze or utilize the data once it is collected. This renders the entire customer feedback process useless.

- Discuss using the following examples.

Suppose an organization has a 95% customer satisfaction rate. What should the organization do to satisfy the other 5% of its customers?

- Without having specific information about how well the organization is doing on its product requirements, the organization does not have the necessary information to make improvements that will increase customer satisfaction.
- Going through the steps in the "prepare to collect" phase will provide the necessary information to ensure that the right data is being collected

- Put on Overhead 3-16.

Customer Feedback
Phase 1: Prepare to Collect
Continued

Product Criteria

- It must be a noun.
- It must be made plural with an "s" or "es."
- It must be deliverable (you must be able to give it to someone).
- It must be yours to give.

3-16

The first step in preparing to collect customer feedback is to determine the products that the One-Stop provides.

- Review the four criterion suggested by Ken Miller to determine if something is a product:

- Put on Overhead 3-17.

Customer Feedback
Phase 1: Prepare to Collect
Continued

- Activity Worksheet 3-A--***Identifying Customer Standards***--will be used for an exercise that will ask you to :
  - Identify products.
  - Identify customers.
  - Identify product outcomes and features.
  - Identify customer requirements.
  - Define customer standards.

3-17

- Help participants find Activity Worksheet 3-A, ***Identifying Customer Standards.***

- Put on Overhead 3-18.

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Products

- Working with your table, and using the criteria, identify products that your One-Stop:
  - delivers currently.
  - could deliver in the future.

3-18

- Review the first step in Phase 1—Identify Products.

- Explain the instructions for the activity. Have the attendees complete the first column of the form. Set the timer for 3 minutes.

- Once the three minutes have elapsed, ask the first table to list **one** product they identified. Ask the group to go over each of the criteria to see if that suggested product meets each of the criteria.

- If it does, write it on the flip chart.

- Go to the next table and repeat the process until you have at least one product from each table.

- Put on Overhead 3-19.

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Customer(s)
Who directly receives that product?

- Working within your table, take 3 products that you have identified.
- For each one, identify the customer(s) for that product.

3-19

- Review the second step in Phase 1—Identify the Customer.

The customer is the person who directly receives the product from the provider.

- Instruct each table to take three products from their list and identify the customer(s) for each of these products. These can be listed next to each product in column 2 of Activity Worksheet 3-A.

A customer for one product may not be the customer for another product. This is why we list the products first.

- Set the timer for three minutes and tell the participants they have three minutes to identify customers for their products.

- Once the three minutes are up, ask each table to state 1 product (if it is a new one, review it against the 4 criteria). Then have them list all the customers of that product to whom they directly deliver the product.

- List the product named by the first table and each of its customers on the flip chart.

- Do a round robin of tables until you have at least one distinct product and all the customers of that product for each table.

- Put on Overhead 3-20.

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify What Customer Values

- **Product Outcome:** What does the customer want as a result of the product?
- **Product Feature:** "A satisfying product **has**..."

3-20

- Review the third step in Phase 1—Determine the Product Outcome (what the customer values about that product).

An easy question to get at the outcome/value of a product is to complete the sentence: "A satisfying (product) RESULTS IN..."

- Have each table use one of the products they listed in the last part of the exercise and choose one of the identified customers of that product. Utilizing that one customer of that one product, have the attendees complete the third column of Activity Worksheet 3-A under "what customers value about that product."

- Again set the timer for 3 minutes.

- Once the three minutes are up, ask one table to identify the product they chose, the customer of that product, and how the customer would have completed the statement, "A satisfying (product) results in....."

When you complete the phrase, "a satisfying product RESULTS IN ..." you are identifying what the customer values about that product.

- If tables are having trouble reporting the outcome, please help them rephrase their information in the form of an outcome.

- Record the outcomes identified by at least 2 tables on the flip chart.

- Stay on Overhead 3-20.

- Describe the 4th step in Phase I—Identify Product Features.

One way to determine what features of a product a customer values is to have the customer complete the following phrase: "a satisfying product HAS..."

- Give an example of some features from one of the customers/products that have been discussed already.

There is not sufficient time today to identify features that customers value for all of your One-Stop products, but it is important to do so once you get back home.

- Put on Overhead 3-21.

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Product Requirements
What would satisfy the customer?

- Using one **product** and one **customer** of that product, list the adjectives the customer would use to describe a satisfying one.

3-21

- Review the definition of a product requirement.

A way to identify the requirements of the customer for a product is to have the customer complete the following statement, "A satifying (product) IS [one which]…."

- Have each table take one of its products and one of that product's customers.

Fill in the sentence, "A satisfying (product) is…." the way your customer would. Use this information to complete the fourth column on Activity Worksheet 3-A.

- Set the timer for three minutes.
- When the time is up, ask a table to report out by giving the name of the product, the customer group, and the requirements for a satisfying product.
- Capture each table's report out on the flip chart, using the columns as they have them listed on Activity Worksheet 3-A.

- Put on Overhead 3-22.

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Customer Standards

How does the customer define his/her product requirement(s)?

- Using your list of requirements, identify the customer's definition of product requirements.

3-22

- Describe the definition of "standard."
- Have each table complete the last column of their form by taking the requirements that they established. For each requirement, have them identify the customer's definition of the requirement (standard).
- Set the timer for 3 minutes.
- After the time is up, have one or two tables (as time permits) report out the standards they identified.
- Discuss how important it is to have the customers identify the

features, values, requirements and standards.

Today we have identified customer's values, requirements, and standards to understand what they might be. But it is not OUR ideas that are true customer requirements. We have to ask customers about their values, requirements, and standards. It is important to gather this input FROM THE CUSTOMER.

- Remind attendees about the importance of getting detailed and complete customer information in the Customer/Provider activity at the beginning of the session.

Collecting input from the customer is the second phase of the customer feedback cycle—Collecting Customer Feedback.

- Put on Overhead 3-23.

Customer Feedback
Phase 2: Collect

- Categories of Customer Feedback:
  - Qualitative
  - Quantitative

3-23

There are two types or categories of customer feedback: qualitative and quantitative. All customer feedback can be grouped into one or the other.

- Put on Overhead 3-24 and 3-25.

- Review the overhead points one at a time.

Customer Feedback
Phase 2: Collect
Continued

Qualitative Data
- Provides a clear and precise statement of the problem.
- Identifies the "why."
- Identifies what the customer may be feeling.
- Data CANNOT be generalized.

Examples of Qualitative Methods:
- Focus groups.
- Advisory boards.
- Informal conversations.
- Management by walking around.

3-24

Customer Feedback
Phase 2: Collect
Continued

Quantitative Data
- Attempts to quantify attitudes and behaviors from the population of interest.
- Identifies the "what", "when", "where."
- Draws on a sample that represents the whole.

Examples of Quantitative Methods:
- Paper and pencil surveys.
- Mail surveys.
- Telephone surveys.
- Personal interviews.

3-25

- Put on Overhead 3-26.

Customer Feedback
Phase 2: Collect
Continued

Qualitative	**Quantitative**
• Describes belief.	• Describes prevalence
• No predetermined categories.	• Predetermined categories
• In-depth, small sample of population.	• Wide breadth, large sample of population.
• Subjective.	• Objective
• Interpretive - how and why.	• Statistical - what and how many.

3-26

- Ask the attendees to describe some of the methods they currently use to collect customer feedback.
- Capture them on the flip chart.
- Have them determine if they are qualitative or quantitative.

Both qualitative and quantitative feedback can be collected in a proactive and a reactive manner. Proactive means that you solicit the feedback from the customer. Reactive means that you receive the feedback without prompting for it.

- Using the methods on the flip chart, have the attendees identify which of the methods listed there are reactive and which are proactive.

- Put on Overhead 3-27.

Customer Feedback
Phase 2: Collect
Continued

Proactive	Reactive
• Paper and pencil surveys. • Focus groups. • Daily conversation. • Alumni celebrations. • Follow up reports.	• Unsolicited communication. Letters Phone calls • Complaint logs.

3-27

- Review the points on Overhead 3-27 with the work from the flip chart.

- Put on Overhead 3-28.

Customer Feedback
Phase 2: Collect
Continued

What methods do you currently use to collect customer feedback?

Qualitative?	Quantitative?
Reactive	Reactive
Proactive	Proactive

(Use Activity Worksheet 3-B to note your answers.)

3-28

- Help attendees to locate Activity Worksheet 3-B (a form based on Overhead 3-28).
- At the tables have attendees list ALL the methods they use for collecting customer feedback and list it on Activity Worksheet 3-B within the appropriate cell on the matrix.

- Put on Overhead 3-29.

Customer Feedback
Phase 2: Collect
Continued

Customer Research Considerations

- Nothing is absolute
- More complicated methods = greater chance of error
- Choose the technique based on what you want to know

3-29

- Review the overhead points one at a time. Make sure the attendees understand that the method an organization chooses to use in collecting customer feedback is based on the type of information that is needed.

- If time allows, have attendees break into teams. Have some teams determine which of the quantitative methods seem to be the most complicated, while other teams determine which of the qualitative methods seem to be the most complicated.

- Have the different teams share their conclusions.

- Put on Overhead 3-30.

- Help attendees locate Activity Worksheet 3-C. Review the instructions for Activity Worksheet 3-C.

Customer Feedback
Phase 2: Collect
Continued

Working within your tables:

- Review each scenario on Activity Worksheet 3-C.
- Determine which collection method would be the most effective method to gather the customer data described.
- Share with the other groups.

3-30

- Have members at each table work together to complete the exercise.

- Set the timer for 5 minutes.

- After 5 minutes, check to see how the different tables are progressing, and, if needed, give another 5 minutes.

- After the time is up, review the answers.

We have now discussed the first two phases of the customer feedback cycle.

The third phase will be discussed next. Who remembers what Phase 3 is?

- Reward the person who says "analyze."

- State that there is a different approach to analyzing qualitative and quantitative data.

- Put on Overhead 3-31.

- Review the overhead points one at a time.

Customer Feedback
Phase 3: Analyze

Qualitative Methods

- Organize data.
- Categorize/code data.
- Interpret data.
  - Known - confirmed or challenged?
  - Suspected - confirmed or challenged?
  - New information?
- Write/deliver report.

3-31

- Put on Overhead 3-32.

- Review the overhead points one at a time.

Customer Feedback
Phase 3: Analyze
Continued

Quantitative Methods

- Edit data.
- Categorize/code data.
- Enter data into research database.
- Tabulate/summarize:
  - E.g., Tallies, percentages, averages
- Determine variance.
- Determine reliability/representation.
- Display findings graphically.

3-32

- Note that you use similar but distinct analytic steps to analyze qualitative and quantitative data. To analyze qualitative data, you categorize, code, and interpret customer feedback. To analyze quantitative data, you categorize data, then use statistical analysis techniques to summarize and display findings.

- Put on Overhead 3-33.

Change is not ***what*** you know; it's what you ***do*** with what you know.

3-33

- Read the overhead.

Going through just the first 3 phases of the customer feedback cycle will not lead to improved customer satisfaction, unless you also do the fourth phase.

Do you remember what is Phase 4?

- Reward the person who says "utilize."

- Put on Overhead 3-34.

Customer Feedback
Phase 4: Utilize

- Every decision--from board policies to staff procedures--should be based upon customer data.
- Use customer feedback to make individual daily improvements. *What does this data tell me to do differently?*
- Implement customer feedback within a continuous improvement system.

3-34

- Review the overhead points one at a time.

- Note that Board members should use customer data to establish policies that staff should utilize customer feedback to determine procedures.

Feedback must be used to make daily improvements. Thus, you must be continuously collecting and analyzing feedback. This is

an ongoing cycle. It doesn't happen only one time but over and over again. This ongoing customer feedback cycle is what drives the continuous improvement process.

- Put on Overhead 3-35.

Customer Feedback
Phase 4: Utilize
Continued

Continuous Improvement Process

- Study current situation (problem identification).
- Determine root cause(s).
- Choose a cause.
- Determine solution(s)- choose one.
- Test solution.
- Implement solution.
- Measure results- go back to beginning.

3-35

- Review the overhead points one at a time.

- Note that the "problem" may be something that is causing customer dissatisfaction, or, it could be something that is going OK today, but without improvement may cause customer dissatisfaction tomorrow.

You don't have to improve ONLY those things that are problems.

You must determine the root cause of a problem so that you are fixing the true problem and not just the symptom.

- Note that there may be a variety of causes. It is important to choose the cause that is the most dissatisfying for the customer instead of one that only causes a little dissatisfaction. (Remember the 80/20 rule, which says that 80% of the problems result from 20% of the root causes.)

It is important to brainstorm a variety of possible solutions and then to review these possibilities to find the best. Do not just try the first solution that comes to mind. It may not be the best solution.

It is important to test out the solution for "bugs" or unanticipated problems before undertaking full-scale implementation.

- Note that testing the solution allows for refinement prior to full implementation. Part of testing the solution is gathering data to determine how well the solution worked.

- Once one problem has been handled, it is important to go back to the beginning of the continuous improvement cycle and begin again with a new problem or area for improvement.

- Put on Overhead 3-36.

"The customer, in spirit and in flesh, must pervade the organization -- every system in every department, every procedure, every measure, every meeting, every decision."

Peters
Thriving on Chaos 3-36

- Read the quotation aloud.

- Ask how One-Stops are currently demonstrating their commitment to this quote.

- Capture the responses on the flip chart.

- Put on Overhead 3-37.

Customer Feedback
Phase 4: Utilize
Continued

- Review the scenario described on Activity Worksheet 3-D.
- Work with your group to determine what you would do to increase satisfaction and decrease dissatisfaction.
- Share with the other groups.

3-37

- Help attendees to find Activity Worksheet 3-D.

- Review the activity instructions and ask for questions. Tables will work together.
- Set the timer for 5 minutes.
- After 5 minutes, check with the tables to see if the time is adequate.
- Have each table report out.

- Put on Overhead 3-38.

Practicing the Steps to Customer Feedback

• Focus Groups: one qualitative method of customer feedback

3-38

- State that since focus groups are not as widely used as surveys to gather customer feedback, we will be completing an exercise that gives some hands-on contact with focus groups.

To elicit comprehensive customer feedback, a One-Stop system will need to collect feedback using both qualitative and quantitative methods.

Who has conducted focus groups?

- Have individuals with focus group experience describe focus groups and how they have utilized them in their organizations/One-Stop systems.

- Put on Overhead 3-39.

Practicing the Steps to Customer Feedback - Focus Groups

What Are Focus Groups?

- The most effective way to collect qualitative data (the WHY of an issue).
- Bring 8-12 people together.
- Designated time and place.
- Use a moderator (trained interviewer).
- Loosely structured, free flowing dialogue focused on predetermined issues.
- May be video taped/observed.

3-39

- Review the overhead points one at a time.

- Note the importance of having a skilled moderator for the focus group. One reason a skilled moderator is needed is to ensure that the discussion achieves a useful balance between "loosely structured/free flowing" and "focused."

- Put on Overhead 3-40.

Practicing the Steps to Customer Feedback - Focus Groups

- Determine Objectives
- Review Objectives with Key Players
- Determine Target Audience
- Prepare Script
- Identify/Recruit Participants
- Conduct/Observe Focus Group
- Analyze Focus Group
- Present /Utilize Data

Where are the 4 phases within this list of steps? Where does each begin and end?

3-40

- Review the overhead points one at a time.

Compare the steps involved in conducting focus groups to the

four phases of the customer feedback cycle. Which of the focus group steps correspond to each of the four phases?

- Put on Overhead 3-41.

Practicing the Steps to Customer Feedback - Focus Group

Phase 1 - Prepare to Collect

- Determine objectives.
  - Purpose? Information seeking? Issue/problem? Who wants? How will information be used? Only method?
- Review objectives.
  - Agree on purpose?
- Determine target audience.
- Prepare discussion guide.
  - 9 to 12 questions with 1 to 5 probes, 2 pages, structure using stages

3-41

- Review the overhead points one at a time.

- Put on Overhead 3-42.

Practicing the Steps to Customer Feedback - Focus Group

Phase 1 - Prepare to Collect, Continued

- Identify/recruit participants:
  - Determine selection criteria (homogeneous, reflective of target, unfamiliar with each other, not likely to agree).
  - Develop potential list.
  - Develop screening list.
  - Screen, select, invite, confirm attendance.

3-42

- Review the overhead points one at a time.

- Put on Overhead 3-43.

Practicing the Steps to Customer Feedback - Focus Group
Phase 2: Collect

- Logistics
  - Comfortable, accessible, neutral facility
  - Circle or u-shape room arrangement
  - Compensation
- Moderator
  - Select
  - Skills required
- Observation
  - Prepare note taking form
  - Use tape recorder
  - Make seating chart
  - Organize notes around questions
  - Capture main points
  - Use 10 effective questions

3-43

- Review the overhead points one at a time.
- Highlight the role of the moderator and the need for a highly skilled moderator to achieve the best results.
- Highlight the role of the observers and how they need to take down quotable quotes, know where the questions are on the script, and capture the answers where they go instead of where the person may have responded.

- Put on Overhead 3-44.

Practicing the Steps to Customer Feedback - Focus Group
Phase 2: Collect, Continued

Focus Group Format

- Introduction.
  Establish rapport, environment, session logistics.
- Transition.
  Obtain overview, set stage for in-depth discussion.
- In-Depth Investigation.
  Elicit details, enable participants to elaborate.
- Closure.
  Clarify/alter, verify conclusions, thank participants, handle logistics.

3-44

- Review the overhead points one at a time.

- Put on Overhead 3-45.

Practicing the Steps to Customer Feedback - Focus Group
Phase 2: Collect

Focus Group Role Play

- Determine if you are an observer or participant.
- Participants follow script handed out by trainer.
- Observers take notes on participant comments using Activity Worksheet 3-E.

3-45

- Ask for volunteers to be participants in a mock focus group.
- Once selected, hand out copies of the focus group script and have each participant select a person in the script to role play.

- Give the remaining attendees a copy of the observer form—Activity Worksheet 3-E.

The role of observers is to listen and take notes while the role

play is happening. One useful practice for observers is to take down "quotable quotes."

- Conduct the role play focus group.

- Put on Overhead 3-46.

Practicing the Steps to Customer Feedback - Focus Group

Phase 3: Analyze

Using your notes, as a group, determine:

- What requirements/standards the customers had for the One-Stop.
- What products the customers identified.
- What requirements the customers had for those products.
- What standards they had for the requirements.

3-46

- Have the attendees summarize the focus group findings, question by question. Capture notes on a flip chart.
- Ask the observers first. Then augment with the focus group participants.

- Put on Overhead 3-47.

Practicing the Steps to Customer Feedback - Focus Group

Phase 4: Utilize

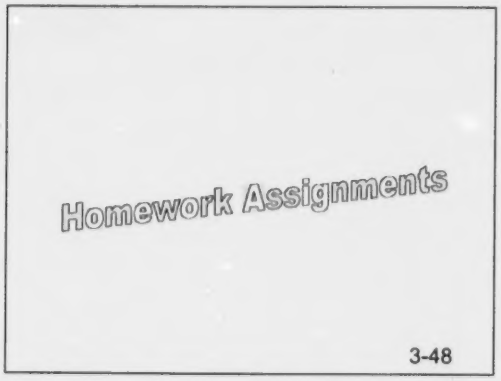
Using the case study description found in Activity Worksheet 3-F:

- Flow chart the customer flow for services that "help customers find jobs."
- Review your chart against the requirements/standards identified in the focus group summarized in the handout.
- Revise/develop your customer flow to meet customer requirements. 3-47

Activity Worksheet 3-F summarizes the results of a series of customer focus groups from a One-Stop in the state of Oklahoma. In this exercise you will analyze how customers flow through processes that "help customers find jobs." You will then use customer feedback to revise the customer flow to better meet customer requirements.

- Have each group flow chart the current job referral process described in the example.
- Set the timer for 5 minutes. Check with each group to make sure that they have had adequate time to complete the exercise.
- When the time is up, have the groups review their current customer flow against the customer requirements that were stated in the case study.
- Have the groups revise their flowchart, as needed, to more closely follow customer requirements and standards.
- Set the timer for another 5 minutes. Check with each group to give adequate time.
- Have each group report out on how they changed their job referral system to respond to customer feedback. Highlight the

key points from each group that show how they listened to and utilized customer requirements and standards from the case study.



We have designed two "homework" assignments to help your local One-Stop partnership practice and apply the ideas presented in this session.

Assignment #1 is designed to help you implement a process to collect and analyze customer feedback on an ongoing basis.

Assignment #2 is designed to help you collect and analyze customer feedback on the One-Stop function "help customers find jobs." This information will be needed in training Module 4 to guide your efforts to reengineer this function to improve customer satisfaction.

Assignment 1:
Develop Action Plan
To Improve Customer Feedback

- Review all of the materials of the session.
- With your team members, review what customer feedback steps and phases are missing within your One-Stop.
- Identify what you will do as first steps to revise your customer feedback process.
- Write down your action plan. Have all team members sign. Share with a partner team. 3-49

- Review the instructions for Assignment 1.

- If there is time during the training session, teams can spend five minutes brainstorming how they will approach Assignment 1 and report out ideas to the whole group.

- Emphasize the importance of setting measurable goals, specific time schedules, and assignments to make action plans happen.

Assignment 2:
Collect and Analyze Data on Customer Requirements

- Review existing information on customer requirements for products that "help customers find jobs."
- Collect new information as needed from customer surveys and focus groups.
- Summarize and analyze customer requirements.
- Bring information to Module 4 session on Redesigning Customer Services.3-50

- Review the instructions for Assignment 2.

- If the team will be proceeding with Module 4, develop an action plan for collecting customer feedback relevant to the

function "help customers find jobs."

- If the session on Module 4 will occur before any new data can be collected, have the team brainstorm what they think customers are concerned about and what customer requirements and standards would look like.

Techniques and Tools

Resource Tool Kit

3-51

The Tool Kit at the end of the Participant Workbook summarizes the process and continuous improvement tools that have been discussed in this and other sessions.

- Put on Overhead 3-52. Review the tools covered in this session.

Tools Referred to in Module 3

- Using customer surveys and other quantitative feedback methods.
- Using customer focus groups and other qualitative feedback methods.
- Flow-charting the customer service process.
- Comparing the current process to identified customer requirements.

3-52

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 3

Collecting and Using Customer Feedback

Participant Workbook

200 Middlefield Road, Suite 100
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Phone (650) 617-8625/Fax (650) 617-8630

CE052599

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality Under the Workforce Investment Act:
A TOOL KIT FOR ONE-STOP SYSTEM BUILDING

Module 3
COLLECTING AND USING CUSTOMER FEEDBACK

Customer/Provider Activity

Purpose

- To learn the importance of using customer feedback to develop a product.

3-2

Customer/Provider Activity

Instructions:

- Find a partner--Designate one person as "A" and one person as "B." "A" s play the role of the customer; "B"s play the role of the provider.
- The trainer will hand out picture to "A"s.
- "A"s will review a picture and develop a one-word description of what they want "B"s to draw for them.
- "B"s have 2 minutes to draw the picture based on the one-word description.

3-3

Customer/Provider Activity

Instructions, Continued

- "A"s review drawing and determine if it meets their criteria.
- "A"s provide additional verbal feedback to "B"s and use the next 2 minutes to help them to create the picture they require.
- Debrief the process.

3-4

Customer/Provider Activity

Review Questions

- "B"s - When you were unable to check with your customer, did you provide the product they were expecting?
- "B"s - How did you feel/what did you think without information from your customer? Was it hard or easy to know what to draw?
- "B"s - How did you feel/what did you think when you worked with your customer? What was easy? What was hard?
- "A"s - Did you get what you expected with the first picture?
- "A"s - What difference did you find when you were able to communicate with the provider as they were drawing the picture?
- As a customer (A), is your input important to get what you want and need? As a Provider (B), is the customer's input needed in order for you to know what the product should look like?

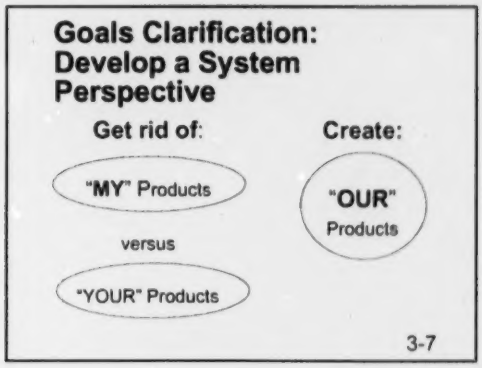
3-5

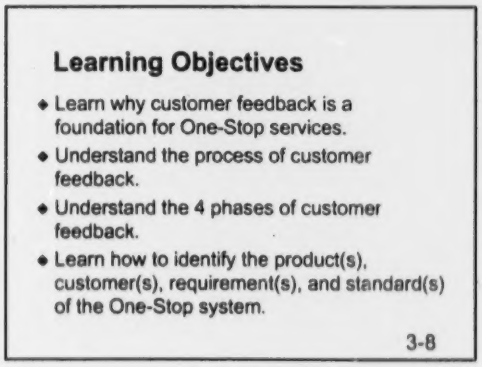
The Customer's Perspective

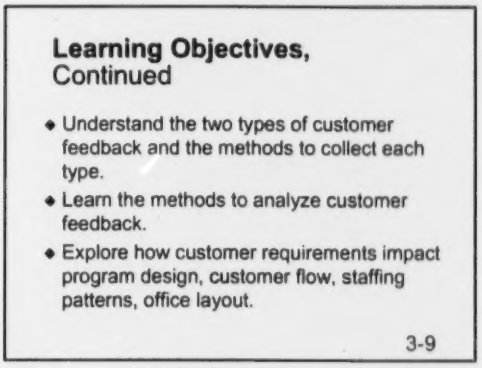
When one has no stake in the way things are, when one's needs or opinion are provided no forum, when one sees oneself as the object of unilateral actions, it takes no particular wisdom to suggest that one would rather be elsewhere.

Seymour Sarason, 1990

3-6


Goals Clarification:
Develop a System
Perspective
Get rid of:
Create:
"MY" Products
versus
"YOUR" Products
"OUR"
Products
3-7


Learning Objectives
Learn why customer feedback is a foundation for One-Stop services.
Understand the process of customer feedback.
Understand the 4 phases of customer feedback.
Learn how to identify the product(s), customer(s), requirement(s), and standard(s) of the One-Stop system.
3-8


Learning Objectives,
Continued
Understand the two types of customer feedback and the methods to collect each type.
Learn the methods to analyze customer feedback.
Explore how customer requirements impact program design, customer flow, staffing patterns, office layout.
3-9

Learning Objectives, Continued

- Learn how to create a team action plan to begin designing/refining your One Stop's Customer Feedback Process.

3-10

Agenda

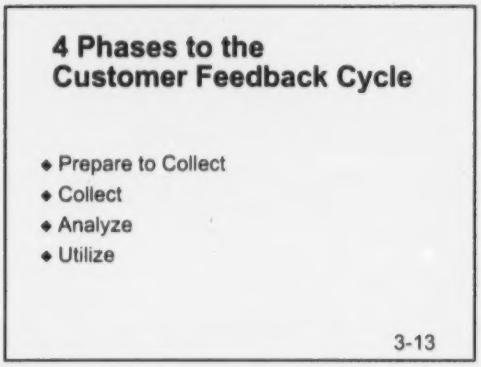
- Introductions/Welcome
- Why Use Customer Feedback to Design One-Stop Centers/Systems?
- The Cycle of Customer Feedback
- 4 Phases to the Customer Feedback Cycle
  - Prepare to Collect
  - Collect
  - Analyze
  - Utilize
- Setting Goals for Improving Customer Services

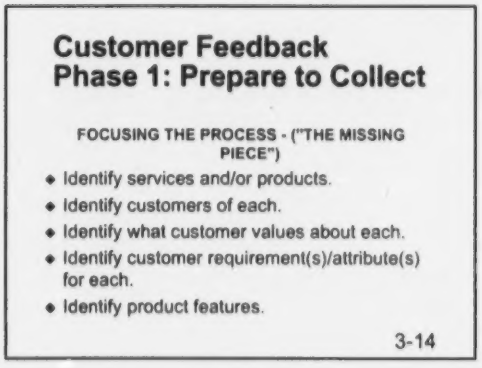
3-11

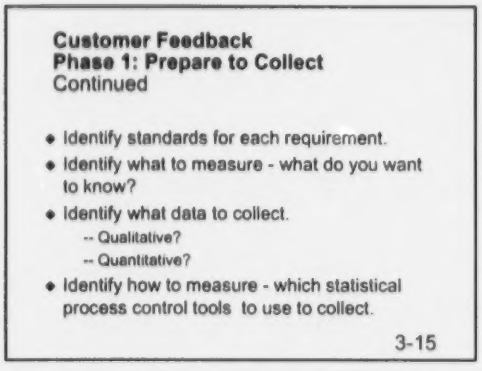
The Customer Feedback Cycle

- ID Services/Products
- ID Customers of the Services/Products
- ID What Customer Values About Each Service/Product
- ID Customer Requirements (Attributes) for Each
- ID Product Features
- ID Customer Standards for the Requirements
- ID What to Measure
- ID What Data to Collect
  Qualitative?
  Quantitative?
- ID How to Measure - Which Statistical Process Control Tools
  – To Collect
  – To Analyze
- Collect the Data
- Analyze the Data
  -- Meet/exceed Customer Standard?
  -- Not Meet Customer Standard?
- Make Improvements

3-12


4 Phases to the
Customer Feedback Cycle
◆ Prepare to Collect
◆ Collect
◆ Analyze
◆ Utilize
3-13


Customer Feedback
Phase 1: Prepare to Collect
FOCUSING THE PROCESS - ("THE MISSING PIECE")
◆ Identify services and/or products.
◆ Identify customers of each.
◆ Identify what customer values about each.
◆ Identify customer requirement(s)/attribute(s) for each.
◆ Identify product features.
3-14


Customer Feedback
Phase 1: Prepare to Collect
Continued
◆ Identify standards for each requirement.
◆ Identify what to measure - what do you want to know?
◆ Identify what data to collect.
-- Qualitative?
-- Quantitative?
◆ Identify how to measure - which statistical process control tools to use to collect.
3-15

Customer Feedback
Phase 1: Prepare to Collect
Continued

Product Criteria

- It must be a noun.
- It must be made plural with an "s" or "es."
- It must be deliverable (you must be able to give it to someone).
- It must be yours to give.

3-16

Customer Feedback
Phase 1: Prepare to Collect
Continued

- Activity Worksheet 3-A--**Identifying Customer Standards** -- will be used for an exercise that will ask you to :
  - Identify products.
  - Identify customers.
  - Identify product outcomes and features.
  - Identify customer requirements.
  - Define customer standards.

3-17

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Products

- Working with your table, and using the criteria, identify products that your One-Stop:
  - delivers currently.
  - could deliver in the future.

3-18

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Customer(s)

Who directly receives that product?

- Working within your table, take 3 products that you have identified.
- For each one, identify the customer(s) for that product.

3-19

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify What Customer Values

- **Product Outcome:** What does the customer want as a result of the product? "A satisfying product **results in**..."
- **Product Feature:** "A satisfying product **has**..."

3-20

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Product Requirements

What would satisfy the customer?

- Using one **product** and one **customer** of that product, list the adjectives the customer would use to describe a satisfying one.

3-21

Customer Feedback
Phase 1: Prepare to Collect
Continued

Identify Customer Standards

How does the customer define his/her product requirement(s)?

- Using your list of requirements, identify the customer's definition of product requirements.

3-22

Customer Feedback Phase 2: Collect

- Categories of Customer Feedback:
  - Qualitative
  - Quantitative

3-23

Customer Feedback
Phase 2: Collect
Continued

Qualitative Data

- Provides a clear and precise statement of the problem.
- Identifies the "why."
- Identifies what the customer may be feeling.
- Data CANNOT be generalized.

Examples of Qualitative Methods:

- Focus groups.
- Advisory boards.
- Informal conversations.
- Management by walking around.

3-24

Customer Feedback
Phase 2: Collect
Continued

Quantitative Data
- Attempts to quantify attitudes and behaviors from the population of interest.
- Identifies the "what", "when", "where."
- Draws on a sample that represents the whole.

Examples of Quantitative Methods:
- Paper and pencil surveys.
- Mail surveys.
- Telephone surveys.
- Personal interviews.

3-25

Customer Feedback
Phase 2: Collect
Continued

Qualitative
- Describes belief.
- No predetermined categories.
- In-depth, small sample of population.
- Subjective.
- Interpretive - how and why.

Quantitative
- Describes prevalence
- Predetermined categories
- Wide breadth, large sample of population.
- Objective
- Statistical - what and how many.

3-26

Customer Feedback
Phase 2: Collect
Continued

Proactive
- **Paper and pencil surveys.**
- **Focus groups.**
- **Daily conversation.**
- **Alumni celebrations.**
- **Follow up reports.**

Reactive
- **Unsolicited communication.**
  - **Letters**
  - **Phone calls**
- **Complaint logs.**

3-27

Customer Feedback
Phase 2: Collect
Continued

What methods do you currently use to collect customer feedback?

Qualitative?	Quantitative?
Reactive	Reactive
Proactive	Proactive

(Use Activity Worksheet 3-B to note your answers.)

3-28

Customer Feedback
Phase 2: Collect
Continued

Customer Research Considerations

- Nothing is absolute
- More complicated methods = greater chance of error
- Choose the technique based on what you want to know

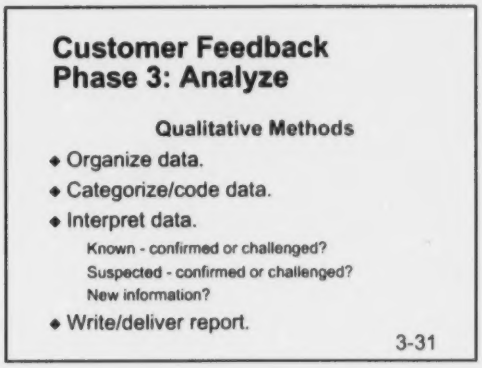
3-29

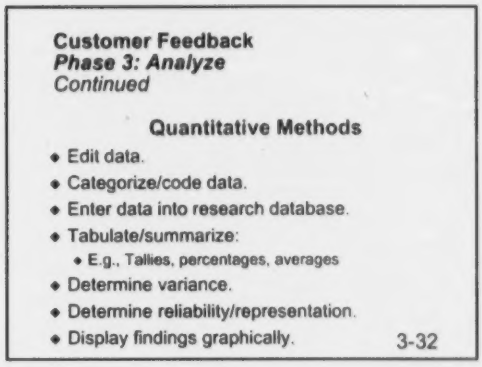
Customer Feedback
Phase 2: Collect
Continued

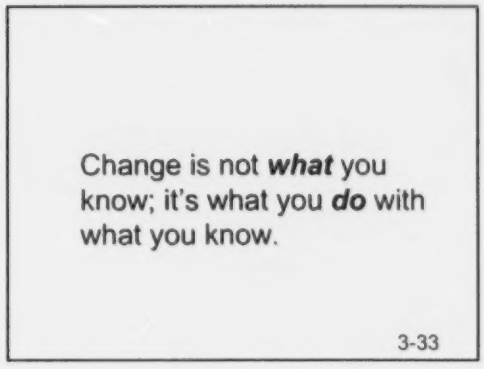
Working within your tables:

- Review each scenario on Activity Worksheet 3-C.
- Determine which collection method would be the most effective method to gather the customer data described.
- Share with the other groups.

3-30


Customer Feedback
Phase 3: Analyze
Qualitative Methods
◆ Organize data.
◆ Categorize/code data.
◆ Interpret data.
Known - confirmed or challenged?
Suspected - confirmed or challenged?
New information?
◆ Write/deliver report.
3-31


Customer Feedback
Phase 3: Analyze
Continued
Quantitative Methods
◆ Edit data.
◆ Categorize/code data.
◆ Enter data into research database.
◆ Tabulate/summarize:
◆ E.g., Tallies, percentages, averages
◆ Determine variance.
◆ Determine reliability/representation.
◆ Display findings graphically.
3-32


Change is not what you know; it's what you do with what you know.
3-33

Customer Feedback Phase 4: Utilize

- Every decision should be based upon customer data, from board policies to staff procedures.
- Use customer feedback to make individual daily improvements. *What does this data tell me to do differently?*
- Implement customer feedback within a continuous improvement system.

3-34

Customer Feedback
Phase 4: Utilize
Continued

Continuous Improvement Process

- Study current situation (problem identification).
- Determine root cause(s).
- Choose a cause.
- Determine solution(s)- choose one.
- Test solution.
- Implement solution.
- Measure results- go back to beginning.

3-35

"The customer, in spirit and in flesh, must pervade the organization -- every system in every department, every procedure, every measure, every meeting, every decision."

Peters
Thriving on Chaos

3-36

Customer Feedback
Phase 4: Utilize
Continued

- Review the scenario described on Activity Worksheet 3-D.
- Work with your group to determine what you would do to increase satisfaction and decrease dissatisfaction.
- Share with the other groups.

3-37

Practicing the Steps to Customer Feedback

- Focus Groups: one qualitative method of customer feedback

3-38

Practicing the Steps to Customer Feedback - Focus Groups

What Are Focus Groups?

- The most effective way to collect qualitative data (the WHY of an issue).
- Bring 8-12 people together.
- Designated time and place.
- Use a moderator (trained interviewer).
- Loosely structured, free flowing dialogue focused on predetermined issues.
- May be video taped/observed.

3-39

Practicing the Steps to Customer Feedback - Focus Groups

- Determine Objectives
- Review Objectives with Key Players
- Determine Target Audience
- Prepare Script
- Identify/Recruit Participants
- Conduct/Observe Focus Group
- Analyze Focus Group
- Present /Utilize Data

Where are the 4 phases within this list of steps? Where does each begin and end?

3-40

Practicing the Steps to Customer Feedback - Focus Group
Phase 1 - Prepare to Collect

- Determine objectives.
  Purpose? Information seeking? Issue/problem? Who wants? How will information be used? Only method?
- Review objectives.
  Agree on purpose?
- Determine target audience.
- Prepare discussion guide.
  9 to 12 questions with 1 to 5 probes. 2 pages. structure using stages.

3-41

Practicing the Steps to Customer Feedback - Focus Group
Phase 1 - Prepare to Collect, Continued

- Identify/recruit participants:
  - Determine selection criteria (homogeneous, reflective of target, unfamiliar with each other, not likely to agree).
  - Develop potential list.
  - Develop screening list.
  - Screen, select, invite, confirm attendance.

3-42

Practicing the Steps to Customer Feedback - Focus Group
Phase 2: Collect

- Logistics
  - Comfortable, accessible, neutral facility
  - Circle or u-shape room arrangement
  - Compensation
- Moderator
  - Select
  - Skills required
- Observation
  - Prepare note taking form
  - Use tape recorder
  - Make seating chart
  - Organize notes around questions
  - Capture main points
  - Use 10 effective questions

3-43

Practicing the Steps to Customer Feedback - Focus Group
Phase 2: Collect, Continued

Focus Group Format

- Introduction.
  Establish rapport, environment, session logistics.
- Transition.
  Obtain overview, set stage for in-depth discussion.
- In-Depth Investigation.
  Elicit details, enable participants to elaborate.
- Closure.
  Clarify/alter, verify conclusions, thank participants, handle logistics.

3-44

Practicing the Steps to Customer Feedback - Focus Group
Phase 2: Collect

Focus Group Role Play

- Determine if you are an observer or participant.
- Participants follow script handed out by trainer.
- Observers take notes on participant comments using Activity Worksheet 3-E.

3-45

Practicing the Steps to Customer Feedback - Focus Group
Phase 3: Analyze

Using your notes, as a group, determine:

- What requirements/standards the customers had for the One-Stop.
- What products the customers identified.
- What requirements the customers had for those products.
- What standards they had for the requirements.

3-46

Practicing the Steps to Customer Feedback - Focus Group
Phase 4: Utilize

Using the case study description found in Activity Worksheet 3-F:

- Flow chart the customer flow for services that "help customers find jobs."
- Review your chart against the requirements/standards identified in the focus group summarized in the handout.
- Revise/develop your customer flow to meet customer requirements/standards.

3-47

Homework Assignments

3-48

Assignment 1:
Develop Action Plan
To Improve Customer Feedback

- Review all of the materials of the session.
- With your team members, review what customer feedback steps and phases are missing within your One-Stop.
- Identify what you will do as first steps to revise your customer feedback process.
- Write down your action plan. Have all team members sign. Share with a partner team.

3-49

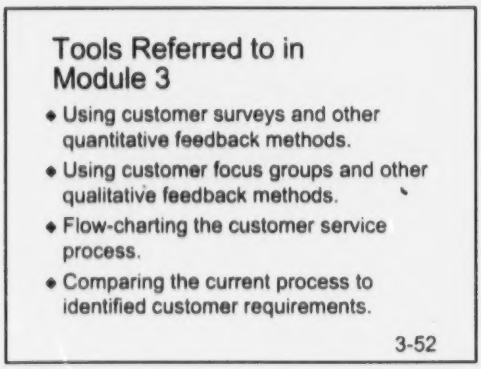
Assignment 2:
Collect and Analyze Data on Customer Requirements

- Review existing information on customer requirements for products that "help customers find jobs."
- Collect new information as needed from customer surveys and focus groups.
- Summarize and analyze customer requirements.
- Bring information to Module 4 session on Redesigning Customer Services.

3-50

Techniques and Tools

3-51


Tools Referred to in Module 3
• Using customer surveys and other quantitative feedback methods.
• Using customer focus groups and other qualitative feedback methods.
• Flow-charting the customer service process.
• Comparing the current process to identified customer requirements.
3-52

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Activity Worksheets

Module 3

200 Middlefield Road, Suite 100
Menlo Park, CA 94025
Phone (650) 617-8625/Fax (650) 617-8630

Activity Worksheet 3-A
Identifying Customer Standards

Product/Service That Your Organization Provides	Customer of That Product/Service (Person Who Directly Receives That Product/Service)	What Customer Values about That Product/Service: Outcome	Possible Customer Requirement for Product/Service	Possible Standard for Customer Requirement

Activity Worksheet 3-A, Continued
Identifying Customer Standards

Product/Service That Your Organization Provides	Customer of That Product/Service (Person Who Directly Receives That Product/Service)	What Customer Values about That Product/Service	Possible Customer Requirement for Product/Service	Possible Standard for Customer Requirement

Activity Worksheet 3-B
What Customer Feedback Methods Do You Currently Use?

	Qualitative	Quantitative
Reactive		
Proactive		

Activity Worksheet 3-C
Choosing Customer Feedback Methods

Your organization is interested in knowing the following information. For each type of information describe the method you would recommend to gather it and why.

- What percentage of welfare mothers believe that child care should be provided at the One Stop?

- The number of youth that completed training in Program Year 1997 compared to the number of adults and older workers.

- What products/services should be delivered in the One Stop?

- How satisfied are the customers using your services?

- What are the requirements/standards for the top 3 products/services requested by your customers?

Activity Worksheet 3-D
(Version 1)
Utilizing Customer Feedback

Survey results state that 95% of your customers are **dis**satisfied with your services because they had to wait for more than 30 minutes after arrival before being able to meet with a staff person. Your team was given the responsibility to decrease customer dissatisfaction and increase customer satisfaction. What do you do?

Activity Worksheet 3-D
(Version 2)
Utilizing Customer Feedback

Survey results state that two out of every three job seeker plus customers who use the resource room would use it more if you were open nights and weekends. Your team was given the responsibility of increasing customer satisfaction. What do you do?

Activity Worksheet 3-D
(Version 3)
Utilizing Customer Feedback

Survey results state that employer customers are dissatisfied with your services because the response time for referring applicants is two weeks. Your team was given the responsibility to decrease customer dissatisfaction and increase customer satisfaction. What do you do?

Activity Worksheet 3-D
(Version 4)
Utilizing Customer Feedback

Survey results state that 75% of your employer customers are dissatisfied with your services because they have to explain their needs to multiple workforce development representatives/agencies and no one seems to have a grasp on the total scope of available services. The employer customers say they want a single point of contact to be satisfied. Your team was given the responsibility to decrease customer dissatisfaction and increase customer satisfaction. What do you do?

Activity Worksheet 3-E
Roleplay Script for Employer Focus Group

Topic: Job Referral Services

I. INTRODUCTION- 10 minutes

Welcome! My name is_____ and I will be your moderator for this focus group.

Thank you for agreeing to be a part of our focus group. Your participation today will provide us with the opportunity to gather information and feedback from you in order to increase your satisfaction with the job referral services offered by _____ Workforce Development.

Although some of you may know each other, we would like each of you to introduce yourselves, Please tell us our name, the company you represent, and your job title. This will help me as a moderator of the focus group and our observers_____, _____,and,_____get to know you..

_____ Workforce Development is transitioning and experiencing change. Your input will be valuable in assisting us to better meet the needs of our employer customer. We provide job referral and placement services to employers in the surrounding six counties (A,B,C,X,Y,Z.) Our purpose is to provide quality job applicants in a timely manner. We attempt to meet your needs through the use of our computerized job matching system. This system matches applicant skills, experience and education to specific job requirements. In order for this process to work more efficiently, we need specific information from both the employer and the prospective job applicant. We will focus on what a satisfying recruitment service is, how useful our job referral service have been in the past, what skills/requirements you need from qualified job applicants and what improvements can be made to the current job referral process.

We are conducting five additional focus groups like this one so that we can design a system that you, the customers say they want, need and will use. We have developed a list of questions addressing issues we feel are important to the success of he referral and placement system and meeting your need to find skilled workers.

During the next 90 minutes, we will be having an open dialogue regarding the _____ workforce development referral and placement process. All of you have today have used the services of one or more of the agencies within_____ workforce development. We will be asking questions about when you have used those agencies and when you have used other referral and recruitment agencies. There are no right or wrong answers. Each of you has equally valuable information and thoughts that are very interested in hearing. I would encourage you to be as open and honest with during the meeting as you possibly can.

The purpose of our observers is to record what you say. We don't want to miss any of your ideas. In addition to taking notes, we will be videotaping this session. I want to assure you that the information gathered at this meeting will be kept confidential and anonymous. The tapes will not be used to identify who said what, but to record all the ideas from the discussion.

Because our time is limited during this session, my role as moderator is to make certain that all topics are covered and to move the discussion along, while ensuring that everyone has a chance to participate in the discussion. As moderator, I want to review the guidelines for participating in focus group:

Give priority to those who have not spoken
Speak briefly and often
Speak one at a time...not on top of each other
Be open and honest
Be specific...talk from your own experiences
Listen without interruption
Present problems...focus on solutions
It is okay to disagree...but not be disagreeable
There are no right or wrong answers...all responses are valid
"Piggy-back" on (augment) other's answers

Again, the focus group is scheduled to last approximately 90 minutes. Are there any questions about what we are going to do today or about anything that I have said? Okay, let's turn on the tape and begin our discussion.

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

- It is okay to disagree, but not be disagreeable.
- There are no right or wrong answers. All responses are valid.
- "Piggy-back" on (augment) others' answers.

Again, the focus group is scheduled to last approximately 90 minutes. Are there any questions about what we are going to do today or about anything that I have said? Okay, let's turn on the tape and begin our discussion.

MODERATOR'S QUESTIONS FOR EMPLOYER FOCUS GROUP ON JOB REFERRAL PROCESS

Note: An Observer Note-Taking Form (With Space Between Questions) Follows the Script

I. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE (20 minutes)

Contextual statement: *The focus of our first area of discussion is on finding out what you look for when choosing a recruitment resource. What is important to you in how you receive those services?*

Primary Question: A satisfying recruitment resource **IS**.....

REQUIREMENT:	**STANDARD** - (What does that mean to you?)

Primary Question: Which are the **most** important of these requirements?

Primary Question: Which are the **least** Important of these requirements?

Primary Question: A satisfying recruitment resource **has**.....

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

I. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
(20 minutes)

Contextual statement: *The focus of the second area of discussion is to identify your past experiences with job referral services provided by the workforce development system agencies we discussed earlier.*

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?

II. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
Continued

What was **not** satisfying?

What could have made it **more** satisfying?

III. SKILL REQUIREMENTS - 20 minutes

Contextual Statement: The focus of the third area of discussion is on finding out what skills/qualities you require of the job applicant referrals we make to you that would lead to a better match, less employee turnover and more productivity.

Primary Question: What are the skills/qualities you are looking for when hiring an individual?

Skills **Further Describe:**

Primary Question: What are the skills that are the **most important** to you?

Primary Question: What are the skills that are **least important** to you?

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

IV. WRAP UP COMMENTS

1. *In summary - here are the important items that I learned from you about------*

   A. *The requirements of a recruitment/job referral agency are.....*
   B. *What you liked about the experiences with our agencies is.....*
   C. *What you disliked about your experiences with us is.....*
   D. *The skills/qualities you want in a qualified employee are.....*

2. *What did I miss?*

3. *Before we wrap up, I would like to open the discussion for you to bring up any other issues that you would like to discuss on these topics.*

4. *Here's what we will do with the information we have gathered today:*

   - Take information from all 6 focus groups
   - Analyze it
   - Make decisions on designing referral processes, how referrals will be made and how you will receive them.
   - Feed back this information to you in a report as well as in our changed behaviors.

Thank you again for helping us to design a referral and placement system that will be useful to you.

MODERATORS QUESTION FOR EMPLOYER FOCUS ON JOB RFERRAL PROCESS

I. SATISFYING RECRUITMENT RESOURCE – 20 minutes

Contextual statement: *The focus of our first area of discussion is on finding out what you look for when choosing a recruitment resource...what is important to you in how you receive those services.*

Primary Question: A satisfying recruitment resource **IS**.....

REQUIREMENT:	STANDARD-What does that mean to you?
TIMELY	**WITHIN 24 HOURS FOR MOST JOBS** **2-3 weeks max for professional ones** **1-2 weeks max for seasonal**
EASY TO ACCESS	**NO PAPERWORK HASSLES**
CONVENIENT	**ABLE TO ACCESS HOW/WHEN AND WHERE I WANT** **CAN BE DONE THRU FAX/INTERNET**
EXPANSIVE	**HAVE A LARGE POOL OF JOB APPLICANTS**
PRE-SCREENED	**MEETS MY JOB QUALIFICATIONS**

Primary Question: Which are the most important of these requirements?

PRE-SCREENED
PRE-SCREENED
PRE-SCREENED

EASY TO ACCESS

CONVENIENT
CONVENIENT

Primary Question: Which are the least important of these requirements?

LARGE POOL OF APPLICANTS
LARGE POOL OF APPLICANTS

Primary Question: A satisfying recruitment resource **HAS**.....

A LARGE POOL OF APPLICANTS THAT MEET MY SKILLS NEEDS
A LARGE POOL OF APPLICANTS THAT MEET MY SKILLS NEEDS

FRIENDLY STAFF

KNOWLEDGEABLE STAFF (staff that know me and my needs, that know how to screen to fit my particular organization's culture)

INTERNET ACCESS-I am able to input my job order on the internet-without having to call your office

INTERNET ACCESS
INTERNET ACCESS

STAFF WHO ARE ABLE TO PRE-SCREEN FOR I-9S, LEGAL PROBLEMS OF THE APPLICANT, TRUTH ABOUT EDUCATION CERTIFICATIONS AND DEGREES, PREVIOUS POOR WORK HISTORY OF THE JOB APPLICANTS

II. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES-20 minutes

Contextual Statement: *The focus of this second area is to identify your past experiences with job referral services provided by the workforce development system agencies we discussed earlier.*

Primary Question: As you think back on those placement services experiences that you had with those agencies, what was **satisfying** to you?

FRIENDLY STAFF
FRIENDLY STAFF
FRIENDLY STAFF

KNOWLEDGEABLE STAFF
KNOWLEDGEABLE STAFF

Who was **NOT** satisfying?

I HAD TO WAIT TOO LONG FOR THE REFERRALS-4 DAYS IS TO LONG

I HAD TO WAIT TO LONG FOR THE REFERRALS

ALL OF THE JOB APPLICANTS WERE NOT ADEQUATELY SCREENED-SOME OF THEM SAID THAT THEY HAD SCHOOLING THAT THEY DID NOT HAVE

YOUR HOURS OF OPERATION ARE NOT EXPANSIVE ENOUGH-I NEED TO BE ABLE TO ACCESS YOU ON SATURDAYS ONR AFTER 6 PM DURING THE WEEK

What could have made it more satisfying?

QUICKER TURNAROUND ON REFERRALS

ABLE TO ACCESS WHEN I NEED IT

III. SKILL REQUIREMENTS 20-minutes

Contextual Statement: *The focus of the third area of discussion is on finding out want skills/qualities you require of the job applicant referrals we make to you that would lead to a better match, less employee turnover and more productivity.*

Primary Question: What are the skills/qualities you are looking for when hiring an individual?

skills:	**further describe:**
COMPUTER SKILLS **COMPUTOR SKILLS**	**KEYBOARD/WORD PROCESSING** **WORD PROCESSING**
DESIRE TO WORK **FOLLOW THROUGH** **RELIABLE**	**THERE EVERY DAY, ON TIME**
RELIABLE	**SCHEDULE DR. APPOINTMENTS OFF WORK**
TEAM SKILLS	**ABLE TO WORK WITH TEAMS TO GET WORK DONE**
PROBLEM SOLVING	**DON'T HAVE TO ALWAYS ASK WHAT TO DO** **INTERDEPENDENT**
TEAM SKILLS **DESIRE TO WORK**	**CAN WORK WITH OTHERS** **COMES READY TO WORK-DOESN'T BRING HOME PROBLEMS WITH THEM**

GOOD BASIC SKILLS **MATH FOR SPC, CAN READ INSTRUCTIONS**

FOCUSED ON THE CUSTOMER

GOOD BASIC SKILLS **I CAN TEACH THEM THE JOB SKILLS IF THEY HAVE THE READING AND MATH SKILLS AMD SKILLS THSAT HELP THEM LEARN**

Primary Question: What are the skills that are the **most important** to you?

COMPUTER SKILLS, BASIC SKILLS

COMPUTER SKILLS RELIABLE, WILLING TO WORK

BASIC SKILLS, WILLING TO WORK

Primary Question: What are the skills that **are important** to you?

NONE

ALL ARE IMPORTANT

ALL ARE IMPORTANT

IV. WRAP UP 20 minutes

1. In summary-here are the important items that I learned from you about.....

A. The requirements of a recruitment/job referral agency are.....
B. What you liked about the experiences with our agencies is...
C. What you disliked about your experiences with us is...
D. The skills/qualities you want in a qualified employee are...

2. What did I miss?
EVERYTHING WAS COVERED

YOU CAPTURED EVERYTHING

3. Before we wrap up, I would like to open the discussion for you to bring up any other issues that you would like to discuss on these topics.

WILL YOU BE ABLE TO STRAT SERVE PEOPLE THAT ARE NOT TARGETTED?

IIT IS HARD FOR ME TO FING PEOPLE WITH THE SKILLS I NEED AND I WANT YOU TO HAVE THE LARGEST POOL OF PEOPLE TO WORK WITH AS POSSIBLE

I WOULD LOVE FOR YOUR AGENCEY TO LESSEN THE RISK FOR MY ORGANIZATION TO HIRE PEOPLE-COULD YOU REFER PEOPLE TO ME THAT YOU WOULD PAY THEIR WAGES DURING A TRYOUT PERIOD OF 3 MONTHS. I WOULD BE WILLING TO PAY YOU, WITH A SMALL ADMINISTRATIVE FEE... IF YOU COULD LESSON MY LIABLITY ON NEW WORKERS. I WOULD THEN BE ABLE, AFTER THE TRYOUT PERIOD

- *4. Here's what we will do with the information we have gathered today...*
- *Take information from 6 focus groups*
- *Analyze it*
- *Make decisions on designing referral processes, how referrals will be made and how will you receive them.*
- *Feed back this infromation to you in a report as well in our changed behaviors.*

Thank you again for helping us to design a referral and placement system that will be useful to you.

Activity Worksheet 3-E
Note-Taking Form
for Employer Focus Group on Job Referral Services

ATTENDEES:

II. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE (20 minutes)

Contextual statement: *The focus of our first area of discussion is on finding out what you look for when choosing a recruitment resource. What is important to you in how you receive those services?*

Primary Question: A satisfying recruitment resource **IS**.....

REQUIREMENT:	**STANDARD** - (What does that mean to you?)

Activity Worksheet 3-E
Observer Note Taking Form
Continued

II. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE
Continued

Primary Question: A satisfying recruitment resource **IS**.....
Continued

Most Important?

Least Important?

Primary Question: A satisfying recruitment resource **has**.....

Activity Worksheet 3-E
Observer Note Taking Form
Continued

III. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
(20 minutes)

Contextual statement: The focus of the second area of discussion is to identify your past experiences with job referral services provided by the workforce development system agencies we discussed earlier.

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?

What was **not** satisfying?

Activity Worksheet 3-E
Observer Note-Taking Form
Continued

III. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
Continued

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?
Continued

What could have made it more satisfying?

III. SKILL REQUIREMENTS - 20 minutes

Contextual Statement: The focus of the third area of discussion is on finding out what skills/qualities you require of the job applicant referrals we make to you that would lead to a better match, less employee turnover and more productivity.

Primary Question: What are the skills/qualities you are looking for when hiring an individual?

Skills	**Further Describe:**

Activity Worksheet 3-E
Observer Note-taking Form
Continued

Primary Question: What are the skills that are the **most important** to you?

Primary Question: What are the skills that are **least important** to you?

Activity Worksheet 3-E
Observer Note-taking Form
Continued

V. WRAP UP COMMENTS

Missed Items:

Additional items not previously covered:

Activity Worksheet 3-E

Observer Note-taking Form
for Employer Focus Group on Job Referral Services

ATTENDEES:

III. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE (20 minutes)

Contextual statement: *The focus of our first area of discussion is on finding out what you look for when choosing a recruitment resource. What is important to you in how you receive those services?*

Primary Question: A satisfying recruitment resource **IS**.....

REQUIREMENT:	**STANDARD** - (What does that mean to you?)

Activity Worksheet 3-E

Observer Note-taking Form
Continued

IV. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE
Continued

Primary Question: A satisfying recruitment resource **IS**.....
Continued

Most Important?

Least Important?

Primary Question: A satisfying recruitment resource **has**.....

Activity Worksheet 3-E

Observer Note-taking Form
Continued

V. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
(20 minutes)

Contextual statement: *The focus of the second area of discussion is to identify your past experiences with job referral services provided by the workforce development system agencies we discussed earlier.*

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?

What was **not** satisfying?

Activity Worksheet 3-E, Continued

IV. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
Continued

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?
Continued

What could have made it more satisfying?

III. SKILL REQUIREMENTS - 20 minutes

Contextual Statement: The focus of the third area of discussion is on finding out what skills/qualities you require of the job applicant referrals we make to you that would lead to a better match, less employee turnover and more productivity.

Primary Question: What are the skills/qualities you are looking for when hiring an individual?

Skills	**Further Describe:**

Activity Worksheet 3-E

Observer Note-taking Form

Continued

Primary Question: What are the skills that are the **most important** to you?

Primary Question: What are the skills that are **least important** to you?

Activity Worksheet 3-E
Observer Note-taking Form
Continued

VI. WRAP UP COMMENTS

Missed Items:

Additional items not previously covered:

Activity Worksheet 3-F

Activity Worksheet 3-E
Script for Employer Focus Group on Job Referral Services

INTRODUCTION - 10 minutes

Welcome! My name is _____ and I will be your moderator for this focus group.

Thank you for agreeing to be a part of our focus group. Your participation today will provide us with the opportunity to gather information and feedback from you in order to increase your satisfaction with the job referral services offered by _____ Workforce Development.

Although some of you may know each other, we would like each of you to introduce yourselves. Please tell us your name, the company you represent, and your job title. This will help me as a moderator of the focus group and our observers _____, _____, and _____ get to know you.

_____ Workforce Development is transitioning and experiencing change. Your input will be valuable in assisting us to better meet the needs of our employer customer. We provide job referral and placement services to employers in the surrounding six counties (A, B, C, X, Y, Z.) Our purpose is to provide quality job applicants in a timely manner. We attempt to meet your needs through the use of our computerized job matching system. This system matches applicant skills, experience and education to specific job requirements. In order for this process to work more efficiently, we need specific information from both the employer and the prospective job applicant. We will focus on what a satisfying recruitment service is, how useful our job referral services have been in the past, what skills/requirements you need from qualified job applicants and what improvements can be made to the current job referral process.

We are conducting five additional focus groups like this one so that we can design a system that you, the customers say they want, need and will use. We have developed a list of questions addressing issues we feel are important to the success of the referral and placement system and meeting your need to find skilled workers.

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

During the next 90 minutes, we will be having an open dialogue regarding the _____ workforce development referral and placement process. All of you here today have used the services of one or more of the agencies within _____ workforce development. We will be asking questions about when you have used those agencies and when you have used other referral and recruitment agencies. There are no right or wrong answers. Each of you has equally valuable information and thoughts that we are very interested in hearing. I would encourage you to be as open and honest with during the meeting as you possibly can.

The purpose of our observers is to record what you say. We don't want to miss any of your ideas. In addition to taking notes, we will be videotaping this session. I want to assure you that all the information gathered at this meeting will be kept confidential and anonymous. The tapes will not be used to identify who said what, but to record all the ideas from the discussion.

Because our time is limited during this session, my role as moderator is to make certain that all topics are covered and to move the discussion along, while ensuring that everyone has a chance to participate in the discussion. As moderator, I want to review the guidelines for participating in a focus group:

- Give priority to those who have not spoken.
- Speak briefly and often.
- Speak one at a time, not on top of each other.
- Be open and honest.
- Be specific. Talk from your own experiences.
- Listen without interruption.
- Present problems. Focus on solutions.

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

- It is okay to disagree, but not be disagreeable.
- There are no right or wrong answers. All responses are valid.
- "Piggy-back" on (augment) others' answers.

Again, the focus group is scheduled to last approximately 90 minutes. Are there any questions about what we are going to do today or about anything that I have said? Okay, let's turn on the tape and begin our discussion.

MODERATOR'S QUESTIONS FOR EMPLOYER FOCUS GROUP ON JOB REFERRAL PROCESS

Note: An Observer Note-Taking Form (With Space Between Questions) Follows the Script

I. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE (20 minutes)

Contextual statement: *The focus of our first area of discussion is on finding out what you look for when choosing a recruitment resource. What is important to you in how you receive those services?*

Primary Question: A satisfying recruitment resource **IS**.....

REQUIREMENT:	**STANDARD** - (What does that mean to you?)

Primary Question: Which are the **most** important of these requirements?

Primary Question: Which are the **least** Important of these requirements?

Primary Question: A satisfying recruitment resource **has**.....

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

II. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES (20 minutes)

Contextual statement: *The focus of the second area of discussion is to identify your past experiences with job referral services provided by the workforce development system agencies we discussed earlier.*

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?

II. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
Continued

What was **not** satisfying?

What could have made it **more** satisfying?

III. SKILL REQUIREMENTS - 20 minutes

Contextual Statement: The focus of the third area of discussion is on finding out what skills/qualities you require of the job applicant referrals we make to you that would lead to a better match, less employee turnover and more productivity.

Primary Question: What are the skills/qualities you are looking for when hiring an individual?

Skills	**Further Describe:**

Primary Question: What are the skills that are the **most important** to you?

Primary Question: What are the skills that are **least important** to you?

Activity Worksheet 3-E
Script for Employer Focus Group
Continued

IV. WRAP UP COMMENTS

1. *In summary - here are the important items that I learned from you about------*

   A. *The requirements of a recruitment/job referral agency are.....*
   B. *What you liked about the experiences with our agencies is.....*
   C. *What you disliked about your experiences with us is.....*
   D. *The skills/qualities you want in a qualified employee are.....*

2. *What did I miss?*

3. *Before we wrap up, I would like to open the discussion for you to bring up any other issues that you would like to discuss on these topics.*

4. *Here's what we will do with the information we have gathered today:*

   - Take information from all 6 focus groups
   - Analyze it
   - Make decisions on designing referral processes, how referrals will be made and how you will receive them.
   - Feed back this information to you in a report as well as in our changed behaviors.

Thank you again for helping us to design a referral and placement system that will be useful to you.

Activity Worksheet 3-E
Note-Taking Form
for Employer Focus Group on Job Referral Services

ATTENDEES:

II. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE (20 minutes)

Contextual statement: *The focus of our first area of discussion is on finding out what you look for when choosing a recruitment resource. What is important to you in how you receive those services?*

Primary Question: A satisfying recruitment resource **IS**.....

REQUIREMENT:	**STANDARD** - (What does that mean to you?)

Activity Worksheet 3-E
Observer Note Taking Form
Continued

III. REQUIREMENTS FOR A SATISFYING RECRUITMENT RESOURCE
Continued

Primary Question: A satisfying recruitment resource **IS**.....
Continued

Most Important?

Least Important?

Primary Question: A satisfying recruitment resource **has**.....

Activity Worksheet 3-E
Observer Note Taking Form
Continued

IV. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES (20 minutes)

Contextual statement: *The focus of the second area of discussion is to identify your past experiences with job referral services provided by the workforce development system agencies we discussed earlier.*

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?

What was **not** satisfying?

Activity Worksheet 3-E
Observer Note-Taking Form
Continued

III. EXPERIENCES WITH WORKFORCE DEVELOPMENT AGENCY JOB REFERRAL SERVICES
Continued

Primary Question: As you think back on those placement service experiences that you had with those agencies, what was **satisfying** to you?
Continued

What could have made it more satisfying?

III. SKILL REQUIREMENTS - 20 minutes

Contextual Statement: The focus of the third area of discussion is on finding out what skills/qualities you require of the job applicant referrals we make to you that would lead to a better match, less employee turnover and more productivity.

Primary Question: What are the skills/qualities you are looking for when hiring an individual?

Skills **Further Describe:**

Activity Worksheet 3-E
Observer Note-taking Form
Continued

Primary Question: What are the skills that are the **most important** to you?

Primary Question: What are the skills that are **least important** to you?

Activity Worksheet 3-E
Observer Note-taking Form
Continued

V. WRAP UP COMMENTS

Missed Items:

Additional items not previously covered:

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SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act: A Tool Kit for One-Stop System Building

Case Studies

Module 3

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CASE STUDY EXAMPLE
MODULE 3. COLLECTING AND USING CUSTOMER FEEDBACK

CENTRAL TEXAS PRIVATE INDUSTRY COUNCIL

In Central Texas, a "bottom-up" approach was used to develop a customer-driven service delivery system[1]. First, a customer satisfaction survey was used to establish the baseline by which to measure expected improvements. When reviewing the survey results, it became clear that "while we knew how customers felt about what mattered to us, we were no closer to understanding how customers felt about what mattered to them". Central Texas then moved "Beyond the Survey" and selected a multiple focus group format as stage two in their efforts to facilitate a customer communication process. The focus group plan included four job seeker focus groups and two employer focus groups, followed by a front-line staff "workshop". The front-line staff workgroup included representatives from all of the One-Stop partners, who were tasked with analyzing the focus group responses and recommending service improvements.

Focus group participants were solicited through multiple methods of marketing, including news releases, display advertising, public service announcements and Chamber of Commerce newsletters. Each of the focus groups was provided with a "Customer Information Packet", which included an individualized "thank-you" letter and informational brochures about One-Stop services. The focus group questions were carefully crafted by staff ("Don't ask about things that you can't fix!" advises strategic planner and project director Linda Angel). The University of Central Texas Research Institute provided skilled "neutral" moderators.

A summary of the key points brought out through the focus groups was developed by the facilitators and presented to the One-Stop Career Center Staff and the Central Texas Workforce Development Board. Examples of areas identified from the focus groups for Board consideration are as follows:

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[1] Central Texas has been using customer satisfaction surveys and customer (and staff) focus groups to guide the strategic planning process since 1995. Plans are in the works to move "Beyond the Survey and Beyond the Focus Groups" and develop an "on-line" customer survey to augment their customer satisfaction measurement system.

- The clearest challenge identified from the job seeker focus group discussion was the need to have personalized care and attention while still maintaining and/or developing the ability to serve large numbers of customers.
- Job seekers identified difficulties associated with parking, accessibility, and service locations.
- Employers desired access to enhanced services that are built upon those that are currently available. Elimination of current services was strongly discouraged. Primarily, employers were noted to want a system which provides rapid response for the identification of quality applicants
- Employers described "quality" services as customer friendly, including access to computers and staff visiting employers on-site.
- Employers recommended "team" service delivery - with staff members establishing habitual relationships with their employer customers; teams would include specialists to handle special needs. (Examples of specialist services include disabilities, veterans, technical assistance, etc.)
- Front-line staff noted that the new system would require generalists (who know a little about all agencies and services) and specialists (who are experts in the requirements of a specific function and service). Staff felt that true integration would require a significant increase in cross-agency and cross-functional training as well as an increase in general information dissemination.

Based upon the focus group responses and the front-line staff recommendations, a *Customer Satisfaction Strategic Plan* was developed that included specific recommendations to address challenges such as communication, accessibility, integration, training, job seeker and employer services. Copies of the focus group questions and the customer satisfaction survey results are provided on the following pages.

In the words of a Central Texas employer, "in Central Texas we asked customers what they wanted, and began making what sells, as opposed to selling what we make." (*From **Measuring Customer Satisfaction Beyond the Survey**, Linda Angel, Central Texas Workforce Development Board, Belton, Texas)*

Three exhibits are included as examples of the tools used to collect customer feedback by the Central Texas Private Industry Council. Exhibit 3-1 lists the questions posed at focus groups with job seekers. Exhibit 3-2 lists the questions posed at focus

groups with employers. Exhibit 3-3 lists the questions that were used in a mail survey of all JTPA participants and summarizes the customer feedback obtained from the survey.

(Case Study Completed January 1999)

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Job Seeker Questions

- Are you aware of the services currently provided in the Central Texas One-Stop Career Centers? If yes,
- What satisfied you most?
- How could your experience with the One-Stop Centers have been better?
- What more would you like to see One-Stop Centers provide in the future?
- Has anyone had experience working with One-Stop Career Centers before? Why or why not?
- What do you remember?
- What went right?
- What went wrong?
- What kind of job seekers should use the Centers? Why?
- Describe an ideal Center -the kind you would recommend to your best friend.
- What about staff?
- What about facilities?
- What about materials?
- What about services?
- Okay, now, what would "turn you off" about a One-Stop Career Center? Could you give an example?
- What would be an acceptable time to:
  - Wait to be seen?
  - Receive information or services that meets your needs?
  - Expect results (for example, attain employment)?
- Is there anything else?

Employer Questions:

- Have you used any services currently provided in the Central Texas One-Stop Career Centers? If yes, what satisfied you most?
- How could your experience with the One-Stop Centers have been better?
- What would you like to see One-Stop Centers provide in the future?
- Has anyone used a One-Stop Career Center like this before? Why or why not?
- What do you remember?
- What went right?
- What went wrong?
- What kind of employers should use the Centers? Why?
- What kind of job seekers should use the Centers? Why?
- Describe an ideal Center -the kind you would use often.
- What about staff?
- What about facilities?
- What about materials?
- What about services?
- Okay, now, what would "turn you off" about a One-Stop Career Center?
- Could you give an example?
- How long should you have to wait for results?
- Access to successful workers?
- Receive information or services that meets your needs?
- How can the One-Stop Career Centers keep you involved in making it better?
- Is there anything else?

GRAND TOTAL BOTH OFFICES

Number Surveyed: 181
Average: 84.67

Standard Deviation: 12.86
(68% of all responses ranged between 71.81 and 97.53)

AS = Agree Strongly; A = Agree; N = Neutral; D = Disagree; DS = Disagree Strongly

QUESTION	AS	A	N	D	DS
1. The JTPA staff treats me with respect.	115	59	3	4	
2. The JTPA staff acts in a professional and friendly manner.	111	64	4	2	
3. My needs were assessed and related services available to me through JTPA were discussed.	90	82	7	2	
4. I was actively involved in determining the activities I would participate in to reach my goals.	92	78	4	5	2
5. My case manager provided career exploration or counselling about local job availability while helping me to develop my service strategy.	63	72	34	10	2
6. I was given choices.	76	77	15	10	3
7. The JTPA staff listens to me about what I want.	93	74	9	3	2
8. I was enrolled in the training I wanted.	109	59	7	4	2
9. I feel the goals outlined in my service strategy are attainable.	102	73	6		
10. I feel the services I am receiving are appropriate with the goals identified in my service strategy.	96	77	6	2	
11. I was told about services I could get from other agencies.	47	66	34	29	5
12. I was encouraged to apply for financial aid to help me with my living expenses while in training.	80	75	13	9	4
13. My case manager cares what happens to me.	100	70	5	3	3
14. My case manager encourages my attempts to improve my life situation.	97	68	13	2	1
15. My case manager treats me in a manner which helps to improve my self-esteem.	94	71	7	5	4
16. I feel the JTPA program is helping me to become independent and self-sufficient.	108	67	6		
17. I feel I can contact my case manager to discuss any problems which may stop me from reaching my goals.	105	63	5	4	4
18. I am receiving support services through the JTPA program (if needed).	79	72	19	6	5
19. The training I am receiving is improving my chances for employment in the field I have chosen.	123	52	5	1	
20. I feel I will succeed in meeting my goals with the continued support of the JTPA program.	105	61	15		
21. I find the JTPA program and staff helpful.	101	75	5		
22. I feel the JTPA program will help me compete effectively in the local job market.	96	78	7		
23. I believe that tax dollars are well spent on JTPA services.	121	52	5	2	1
24. I feel my input about JTPA program services will be used to improve the local JTPA program.	77	89	15		
25. I cannot get the services I receive from JTPA through another agency.	81	65	27	7	1